



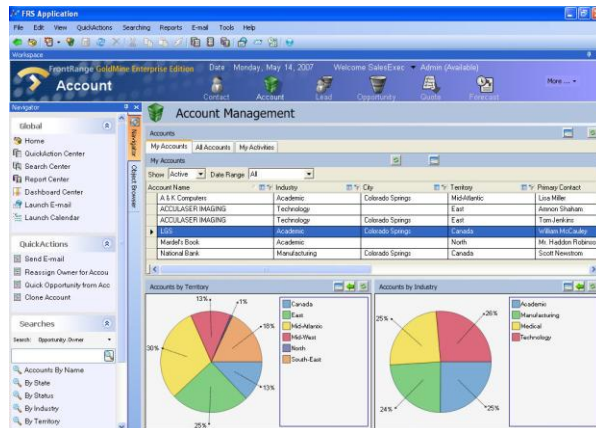
# white paper

Sales Force Automation



Integrated Business Processes for Small & Mid-Sized Businesses

## What's New in GoldMine® Enterprise Edition 6.3.1?



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## **GoldMine® Enterprise Edition A More Flexible CRM System!**

Has the recent market changes effected your customer relationships? Are you able to keep up with the constantly changing market fluctuations? Has your business needs expanded beyond you existing CRM implementation? Do you feel hooked into a CRM solution that is not flexible and one that will not easily allow you to configure the system to match your changing evolving business needs? If so, you will want to evaluate the powerful features released in GoldMine Enterprise Edition – GMEE 6.3.1. GMEE supports all your Customer Relationship Management business needs, such as marketing automation, sales force management and customer service and support. All CRM features are built on a flexible architecture to change as your business changes.

GoldMine Enterprise Edition 6.3.1, the summer 2010 release to the powerful GMEE product line provides additional benefits for your company, including improvements to customer service and support capabilities, sales opportunity management, a comprehensive self service accessible business model, and numerous enhancements to the flexible foundation technology.

Listed below are a few key functional items as well as technology advancements included in GoldMine Enterprise Edition 6.3.1. For a complete list of features, fixes and enhancements please review the readme for GMEE 6.3.1, contact your local GoldMine Solutions specialist or visit [www.frontrange.com](http://www.frontrange.com) for additional product information.

### **What's New in GMEE 6.3.1?**

#### **#1 Advanced Customer Service Additions**

A Customer Service Self-Service module is now available out-of-the-box in GMEE 6.3.1. This self-service functionality gives end clients the ability to submit, track and edit case information directly from the self-service web interface. This interactive approach between end clients and the customer service and support teams provides a more cost effective approach to customer support and an easily accessible customer channel all clients will like. In addition, an entire Knowledge Management module is available for any customer service agent to use in order to improve the case resolution process. Knowledge Management articles can be created and approved into various content stores, accessed via simple or complex end user searches, and linked to any case for better first call resolution, less case transfers and lower overall customer service costs. Knowledge Management content can also be accessible via Self-Service channel mentioned above, once again, improving internal cost and customer happiness by enabling end customers to service themselves.



## **# 2 Usability Enhancements to Screens and Templates**

GMEE 6.3.1 leverages improved FrontRange Foundation technology to give users the ability to view data additional ways. Now, users can choose whether to pop-up a record they wish to view or edit in an entirely new form, or within the existing context view. This feature allows more advanced users to manage multiple GoldMine records at once, whereas new application users can be restricted to a simpler view for improved user adoption and streamlined training. With GMEE 6.3.1 users who wish to leverage a email or letter merge capabilities are now presented with a list of templates from the document center. This template feature improves consistency and quickness when users need to communicate clients and lessens the overall administrative costs.

## **# 3 Partner Relationship Management**

Partner business functionality has been added to capture information designed for partners of your CRM business. Partners can include channel partners or other third party organizations tasked with selling or marketing products or services. Not only can basic partner information be captured in GMEE 6.3.1, but the Partner module can help define margin calculations, as well as certification milestones and partnership levels for use when managing partner leads, sales opportunities and the associated channel revenue stream.

## **# 4 Dashboard Reporting and Analysis**

The GoldMine Enterprise Edition 6.3.1 release includes over a dozen new dashboards specifically designed to further analyze CRM processes. A few of the new dashboards include: a business metric dashboard that displays win-loss data on opportunities filtered by product line, territory and intervals, an activity management dashboard that shows activity process across sales related activities related to revenue bookings and quotas, and numerous opportunity dashboards to further analyze selling stages, individual selling goals, as well as when, where and how revenue is won or lost. In addition, a default My Dashboard module is available in GMEE 6.3.1 to display CRM summary information upfront when the user logs into the application.

## **# 5 Compatibility Updates**

GMEE supports Microsoft® Server 2008, SQL 2008, as well as, 64-bit Server O.S. These extensions help expand the IT infrastructure and additional platform support for Microsoft. Stay ahead of the curve by using the latest GoldMine CRM Solutions on the newest Microsoft products.

## **#6 Expanded Geographic Hierarchy**

The sales territory has been expanded to permit an additional tier when defining the hierarchy. Now, clients are able to use the Geography, Region and Territory fields to structure territory data throughout the CRM business objects, facilitating more precise administration of roles, and achieving analysis that is more granular.



## **#7 Additional Security**

Improvements to GoldMine's security model include the ability to define and visualize the security hierarchy, along with a new system function that determines whether the owner of a record is part of the user's hierarchy. Also, GMEE fields can be encrypted for additional security. These improvements ensure data is always secure and only accessible according to a company's security policies.

## **#8 Activity Management Expansions**

GMEE 6.3.1 adds new Microsoft Outlook integration features that continue to help the end user leverage the world's most commonly used business management tool. This integration helps improve CRM usage and consistent communication in and amongst team members and end clients. GMEE 6.3.1 allows users to push their GoldMine contact list into the Microsoft Outlook Contact list so these contacts can be accessed via Outlook and potentially Smartphone's integrated within a company's Outlook / Exchange environment. A new column has been added to the Outlook inbox to display if an email is linked or not to a record in GoldMine. In addition, GoldMine users can easily send or update Outlook calendar items from a GoldMine quick action or send emails via GoldMine contacts through an address book in Outlook.

## **#9 Performance & Stability**

Finally, GoldMine Enterprise Edition 6.3.1, along with the FrontRange Foundation 6.3 technology release contain over 140 product improvements and additions that assist in the overall advancement to each CRM feature available in GMEE.

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